

Allocations Information for the 2002-2003 W-2 and Related Programs Contract

Allocations information for the W-2 and Related Programs Contract for the 2002-2003 Contract Period is presented on the attached charts. Because Legislative and Governor action is pending on the Biennial Budget Act which covers the 2002-2003 Contract Period, the allocations information is subject to revision. It is presented for W-2 agency information purposes only.

Base Allocations

The Base Allocation for W-2 and Related Programs is identified by W-2 agency (based on the W-2 agencies for the 2000-2001 W-2 and Related Programs Implementation Contract) (see W-2 Base Allocations chart) and includes the following two parts:

- Services/Administration: funding staff salaries and fringe benefits, services, overhead, and other non-benefit allowable expenditures.
- Benefits: funding for CSJs, W-2 T, and Custodial Parent of an Infant payments for the estimated caseload in each W-2 agency.

Allocation Adjustments

In order to determine the Base Allocation, the following adjustments were made:

- 1) Small Agency Supplement: to provide a supplement to the W-2 geographic areas with the smallest allocations to reflect the need for a minimal capacity to deliver the W-2 program and to bring allocations to a \$250,000 minimum level for the combination of both Services/Administration and Benefits;
- 2) Minimum Benefits Amount: to provide an estimated amount for Benefits equivalent to five (5) W-2 Payment Cases to any W-2 geographic area that had fewer than five (5) W-2 Payment Cases in the caseload estimate; and
- 3) Milwaukee: to recognize the increased number of case transfers in Milwaukee because the county is divided into multiple geographic areas, as compared to other W-2 geographic areas. One half of the Base Allocation was distributed by caseload and one half was equally distributed among the W-2 geographic areas in that county.

The sum of Services/Administration with any adjustment if applicable for Small Agency Supplement and Benefits allocations is the Base Allocation. Although information is presented for the separate categories of Services/Administration and Benefits, a W-2 agency has the flexibility to use the Base Allocation for allowable expenses even if the ratio between Services/Administration and Benefits differs from the amounts in the chart.

Caseload Assumptions

The W-2 agency must serve all applicants seeking assistance. Providing required services is assumed within the Base Allocation although there is no specific “case count” for some activities. It is understood that some applicants will be ineligible for payment benefits or other program services. It is also understood that some applicants will decline further services, or use Job Center resources (e.g. JobNet) to obtain employment without further assistance from the W-2 agency.

For the 2002-2003 W-2 and Related Programs Contract, allocations are based on the following concepts:

- 1) Although the number of cases receiving a payment has been reduced significantly since the start of W-2, there are many cases in addition to W-2 Payment Cases that the W-2 agencies are required to serve;
- 2) The composition of the caseload varies significantly from geographic area to geographic area; and
- 3) Although each case is unique, some categories of cases generally require more effort than other categories of cases.

Caseload numbers for W-2 Payment Cases, W-2 Non-Payment Cases (also referred to as Case Management only), Food Stamp Employment and Training (FSET) Cases, and Child Care Cases were taken from CARES data (EOS Report CT03). For W-2 Payment, and W-2 Non-Payment Cases the average monthly caseload for the period January 2000 through January 2001 was projected for the Contract Period. For FSET and Child Care cases, the average monthly caseload for the period January 2000 through February 2001 was projected for the Contract Period. Because caseload numbers are dynamic, the figures are intended to demonstrate relative workload between agencies, and do not necessarily provide an absolute picture of the projected workload for a W-2 agency.

Caseload Adjustment for Difficulty Factors

Although many factors can make one case more “difficult” than another (e.g., amount of education or work experience of the participant, language barriers, mental health issues, physical disabilities), the Department has identified two factors that will be used in adjusting the W-2 agency’s caseload estimate for allocation purposes.

- 1) Educational attainment - for each case where the adult has not achieved a High School diploma or equivalent; and
- 2) Disabled child or adult – for each case where the adult or a child has a disability as identified in CARES.

A point-in-time report (FCB 2001) was used to determine the number of cases with either or both of the characteristics described above. Regardless of the size of the agency’s caseload, each occurrence of either of the two factors above will increase that W-2 agency’s caseload by one case to establish an Adjusted Caseload. The Adjusted Caseload is used to distribute available Services/Administration funds proportionately among the W-2 agencies. See W-2 Base Allocations – Caseload Data chart.

Funding Level Supplement(s)

At any time(s) during the Contract Period and for any uses allowed by the Department for this Contract, a W-2 agency may supplement the funding level available for the Contract with funding already earned by the W-2 agency for TANF restricted-use funding (referred to as "Community Reinvestment"). The amount(s) and frequency of any supplement(s) are at the discretion of the W-2 agency. The W-2 agency will report any supplement(s) to the Department in accordance with the Department's fiscal policies and procedures.

Funding Outside the Base Allocation

Other funds available to W-2 agencies but not reflected in the Base Allocation for the 2002-2003 W-2 Contract and Related Programs Contract include the following:

- Workforce Advancement and Attachment funds (see JAL & WAA Allocations chart);
- Job Access Loan funds (see JAL & WAA Allocations chart);
- Children First funds (based on a local decision regarding whether the W-2 or child support agency will administer the program);
- Employment Skill Advancement Program funds (a total of \$200,000 for the Contract period is available to W-2 agencies on a first come, first served basis until funds are fully spent);
- Supplemental Food Stamp Employment Training funds to match local funds are available at the request of the W-2 agency as long as the W-2 agency is a county or tribe, based on federal regulations. (The requirement to serve FSET cases is covered by the Base Allocation);
- 100 percent Federally Funded Food Stamp Employment Training funds for Able-bodied Adults without Dependents (ABAWDs) is available to W-2 agencies as long as the state receives 100 percent Federally Funded FSET funding; (The requirement to serve FSET cases including ABAWDs is covered by the Base Allocation);
- Contracted Child Care funds (based on a specific plan submitted by the W-2 agency for the Department's approval);
- Community Reinvestment funds earned under the 1997-1999 Wisconsin Works (W-2) Implementation Contract approved by the Department for carryover into the 2002-2003 Contract Period (Funds approved for carryover must be spent by June 30, 2002.);
- Community Reinvestment funds earned under the 2000-2001 Wisconsin Works (W-2) and Related Programs Implementation Contract;
- Start-up funds for new W-2 agencies or existing W-2 agencies operating in different geographic areas (based on available funds).

Allocation Method for Workforce Advancement and Attachment funds for W-2 Agencies

In accordance with Wisconsin Statutes, case counts for W-2 case management cases, FSET, Child Care, diversions from W-2 and non-custodial parents were used in the allocation formula.

Allocation Method for Job Access Loan Funds for W-2 Agencies

Job Access Loan funds were allocated based on a proportion of the W-2 Base Allocation Contract plus additions for usage of JAL funds under the 2000 - 2001 JAL contract.

Funding that was part of the 2000-2001 W-2 and Related Programs Implementation Contract that will not be a part of the 2002-2003 W-2 and Related Programs Contract

The philosophical direction of the W-2 program for the 2002-2003 Contract Period emphasizes retention and advancement in the workplace. A distinction is being made between entitlement programs and non-entitlement work-based programs. Entitlement programs are being aligned with the Income Maintenance (IM) contract and the non-entitlement work-based programs are being aligned with the W-2 contract. For this reason, the responsibilities for and funding for eligibility determination and case processing for entitlement programs (i.e., Food Stamps and Medicaid) is removed from the W-2 Contract beginning January 1, 2002. The numbers presented in the following charts reflect the removal of funding for Food Stamp and Medicaid eligibility determination processing.

Child Care Administrative Funding

The Base Allocations for W-2 agencies includes funding for determining eligibility for subsidized child care. That responsibility has been a requirement of the W-2 agencies since the first W-2 contract and continues to be a requirement in the 2002-2003 contract. A statutory change is needed in order to assign other child care administrative activities to the W-2 agencies. The Department values child care as an integral part of the employment and training services it delivers. No change in allocations has been reflected on the attached charts for the movement of child care administrative responsibilities from the IM agencies to the W-2 agencies.

W-2 Base Allocations – Caseload Data
April 27, 2001

W-2 Agency by Geographic Area	W-2 Pay- ment	W-2 non Pay- ment	FSET	Child Care	W-2 AG less than HS	W-2 AG-With Disabled Child or Adult	Adjusted Caseload
Adams Co	4	6	13	47	2	1	73
Ashland Co	5	1	6	88	3	1	104
Bad River Tribe	6	2	3	29	1	1	42
Barron Co	5	3	17	133	8	1	167
Bayfield Co	3	1	8	30			42
Brown Co	18	16	41	685	17	3	780
Buffalo Co	2	4	8	28	1		43
Burnett Co	2	2	4	24			32
Calumet Co	6	4	2	70	7		89
Chippewa Co	12	9	5	170	13	2	211
Clark Co	4	4	20	32	2	1	63
Columbia Co	9	16	10	99	4	3	141
Crawford Co	1			44			45
Curtis & Assoc. Waukesha	38	33	49	509	23	4	656
Dane Co	294	194	119	1,478	212	73	2,370
Dodge Co	19	24	18	216	16	8	301
Door Co	6	7	5	77	4	1	100
Douglas Co	27	26	66	203	20	5	347
Dunn Co	19	24	10	73	4	2	132
Eau Claire Co	16	19	42	376	18	8	479
Fond du Lac Co	43	21	21	271	23	16	395
Forward Service Florence	2	3	3	11	5	1	25
Forward Service FOV	10	8	24	133	16	2	193
Forward Service Kewaunee	4	2	3	33	1		43
Grant (SW Consortium)	11	12	21	266	1	6	317
Green Lake Co	2	3	12	41		1	59
Iron Co	2	2	1	21		2	28
Jackson Co	4	1	24	29	3	2	63
Jefferson Co	7	10	4	91	5	1	118
Kaiser Group Walworth	27	10	19	136	10	4	206
Kenosha Co	209	149	167	616	147	52	1,340
La Crosse Co	22	18	22	428	13	7	510
Langlade Co	11	7	24	59	13	3	117
Lincoln Co	5	2	15	75	2	1	100
Manitowoc Co	2	3	4	100	1	2	112
Marathon Co	43	24	34	387	42	13	543
Marinette Co	4	1	17	62	1	1	86
Marquette Co	3	1	6	38	6	3	57
Menominee Co	9	6	10	40	5		70
Milwaukee – ESI	1748	1,089	709	3,478	1,538	277	8,839
Milwaukee – MAXIMUS	1,035	534	470	1,540	963	136	4,678
Milwaukee – OIC-GM	1,006	655	229	1,617	839	149	4,495

W-2 Agency by Geographic Area	W-2 Pay- ment	W-2 non Pay- ment	FSET	Child Care	W-2 AG less than HS	W-2 AG-With Disabled Child or Adult	Adjusted Caseload
Milwaukee – UMOS	793	552	403	949	715	129	3,541
Milwaukee – YW Works	632	418	356	987	495	86	2,974
Oconto Co	3	1	16	90	2		112
Oneida Tribe	11	17	4	52	11	1	96
Outagamie Co	34	46	20	359	31	8	498
Ozaukee Co	2		3	118	1	1	125
Pepin Co			3	17			20
Pierce Co	4	3	1	71	1	1	81
Polk Co	7	17	13	114	8		159
Portage Co	5	10	5	180	2	2	204
Price Co	5	5	13	73	2	4	102
Racine Co	115	18	120	726	61	30	1,070
Rock Co	105	31	35	531	55	21	778
Rusk Co	2	3	7	43	2		57
Sauk Co	13	5	23	103	6	2	152
Sawyer Co	4	6	4	115			129
Shawano Job Center	15	11	8	91	8	3	136
Sheboygan Co	24	19	16	165	23	8	255
St. Croix Co	8	11	5	85	2	3	114
Taylor Co	2	3	3	34	5		47
Trempealeau Co	5	3	6	95	1	4	114
Vernon Co	5	2	8	42			57
Washburn Co	3	3	4	44		1	55
Washington Co	13	12	18	216	6	3	268
Waupaca Co	22	18	9	73	11	10	143
Waushara Co		1	9	54			64
Winnebago Co	44	43	26	444	31	7	595
Wood Co	29	13	48	246	20	6	362
Workforce Conn Juneau	17	24	10	58	8	5	122
Workforce Conn Monroe	21	16	13	119	8	2	179
Totals	6,648	4,267	3,494	20,177	5,504	1,130	41,220

For W-2 Payment, and W-2 Non-Payment Cases the average monthly caseload for the period January 2000 through January 2001 was projected for the Contract Period.

For FSET and Child Care cases, the average monthly caseload for the period January 2000 through February 2001 was projected for the Contract Period.

For the adjustment for difficulty factors a point-in-time count for February 2001 was projected for the Contract Period.

**W-2 Base Allocations
May 14, 2001**

W-2 Agency by Geographic Area	Services/ Administration	Benefits *	Small Agency Supplement	Base Allocations
Adams Co	369,593	77,469		447,062
Ashland Co	526,543	77,469		604,012
Bad River Tribe	212,642	92,963		305,605
Barron Co	845,507	77,469		922,976
Bayfield Co	212,642	77,469		290,111
Brown Co	3,949,072	278,889		4,227,961
Buffalo Co	217,705	77,469		295,174
Burnett Co	162,164	77,469	10,367	250,000
Calumet Co	450,599	92,963		543,562
Chippewa Co	1,068,275	185,926		1,254,201
Clark Co	318,964	77,469		396,433
Columbia Co	713,871	139,445		853,316
Crawford Co	227,831	77,469		305,300
Curtis & Assoc. Waukesha	3,321,271	588,767		3,910,038
Dane Co	11,999,104	4,555,194		16,554,298
Dodge Co	1,523,937	294,383		1,818,320
Door Co	506,291	92,963		599,254
Douglas Co	1,756,831	418,334		2,175,165
Dunn Co	668,305	294,383		962,688
Eau Claire Co	2,425,135	247,902		2,673,037
Fond du Lac Co	1,999,851	666,236		2,666,087
Forward Service Florence	126,691	77,469	45,840	250,000
Forward Service FOV	977,143	232,407		1,209,550
Forward Service Kewaunee	217,705	77,469		295,174
Grant (SW Cosortium)	1,605,071	387,345	35,705	2,028,121
Green Lake Co	298,712	77,469		376,181
Iron Co	141,894	77,469	30,637	250,000
Jackson Co	318,964	77,469		396,433
Jefferson Co	597,424	108,457		705,881
Kaiser Group Walworth	1,042,960	418,334		1,461,294
Kenosha Co	6,784,304	3,238,216		10,022,520
La Crosse Co	2,582,086	340,865		2,922,951
Langlade Co	592,361	170,432		762,793
Lincoln Co	506,291	77,469		583,760
Manitowoc Co	567,046	77,469		644,515
Marathon Co	2,749,162	666,236		3,415,398
Marinette Co	435,411	77,469		512,880

W-2 Agency by Geographic Area	Services/ Administration	Benefits*	Small Agency Supplement	Base Allocations
Marquette Co	288,586	77,469		366,055
Menominee Co	354,404	139,445		493,849
Milwaukee – ESI	42,994,420	27,083,262		70,077,682
Milwaukee – MAXIMUS	20,904,336	16,036,142		36,940,478
Milwaukee – OIC-GM	20,665,741	15,586,820		36,252,561
Milwaukee – UMOS	19,900,827	12,286,629		32,187,455
Milwaukee – YW Works	19,712,747	9,792,118		29,504,864
Oconto Co	567,046	77,469		644,515
Oneida Tribe	486,040	170,432		656,472
Outagamie Co	2,521,331	526,791		3,048,122
Ozaukee Co	632,864	77,469		710,333
Pepin Co	101,353	77,469	71,178	250,000
Pierce Co	410,096	77,469		487,565
Polk Co	805,003	108,457		913,460
Portage Co	1,032,834	77,469		1,110,303
Price Co	516,417	77,469		593,886
Racine Co	5,417,317	1,781,794		7,199,111
Rock Co	3,938,946	1,626,855		5,565,801
Rusk Co	288,586	77,469		366,055
Sauk Co	769,563	201,420		970,983
Sawyer Co	653,116	77,469		730,585
Shawano Job Center	688,556	232,408		920,964
Sheboygan Co	1,291,043	371,853		1,662,896
St. Croix Co	577,172	123,951		701,123
Taylor Co	237,957	77,469		315,426
Trempealeau Co	577,172	77,469		654,641
Vernon Co	288,586	77,469		366,055
Washburn Co	278,460	77,469		355,929
Washington Co	1,356,861	201,420		1,558,281
Waupaca Co	723,997	340,865		1,064,862
Waushara Co	324,026	77,469		401,495
Winnebago Co	3,012,433	681,730		3,694,163
Wood Co	1,832,775	449,322		2,282,097
Workforce Conn Juneau	617,675	263,396		881,071
Workforce Conn Monroe	906,261	325,371		1,231,632
Totals	208,693,905	104,165,200	193,727	313,052,831

*Note: The amount per case is the result of the calculation of the total amount available from the Biennial Budget for Benefits divided by the caseload.

JAL & WAA Allocations
May 14, 2001

W-2 Agency by Geographic Area	JAL * Allocations	WAA Allocations
Adams Co	1,756	30,249
Ashland Co	3,881	41,014
Bad River Tribe	1,234	19,740
Barron Co	3,102	62,801
Bayfield Co	943	22,560
Brown Co	13,506	221,206
Buffalo Co	2,339	22,303
Burnett Co	4,345	20,509
Calumet Co	3,020	32,300
Chippewa Co	4,776	66,902
Clark Co	3,485	30,249
Columbia Co	2,814	49,217
Crawford Co	1,008	27,942
Curtis & Assoc. Waukesha	35,008	276,058
Dane Co	66,574	594,917
Dodge Co	8,281	95,610
Door Co	1,897	39,220
Douglas Co	14,902	96,123
Dunn Co	13,597	46,910
Eau Claire Co	20,293	135,596
Fond du Lac Co	17,046	159,689
Forward Service Florence	799	15,383
Forward Service FOV	6,791	92,284
Forward Service Kewaunee	943	20,253
Grant (SW Consortium)	11,103	155,860
Green Lake Co	2,033	26,404
Iron Co	799	17,177
Jackson Co	1,169	26,661
Jefferson Co	2,887	54,598
Kaiser Group Walworth	8,137	74,592
Kenosha Co	111,205	367,818
La Crosse Co	16,390	148,155
Langlade Co	2,255	38,708
Lincoln Co	3,191	38,964
Manitowoc Co	2,059	53,830
Marathon Co	13,890	133,801
Marinette Co	1,622	54,856
Marquette Co	1,299	27,430
Menominee Co	1,557	27,942

W-2 Agency by Geographic Area	JAL * Allocations	WAA Allocations
Milwaukee - ESI	506,328	1,700,418
Milwaukee - MAXIMUS	294,059	803,046
Milwaukee - OIC-GM	215,374	806,891
Milwaukee - UMOS	182,512	631,057
Milwaukee - YW Works	143,616	618,498
Oconto Co	3,671	44,090
Oneida Tribe	1,865	31,018
Outagamie Co	12,379	137,646
Ozaukee Co	2,334	46,653
Pepin Co	799	16,152
Pierce Co	2,766	36,401
Polk Co	12,137	51,523
Portage Co	14,355	73,823
Price Co	2,465	37,939
Racine Co	22,996	343,213
Rock Co	36,118	197,368
Rusk Co	2,683	29,224
Sauk Co	2,269	60,751
Sawyer Co	14,075	59,469
Shawano Job Center	4,975	49,473
Sheboygan Co	11,091	79,206
St. Croix Co	8,257	42,552
Taylor Co	2,389	22,816
Trempealeau Co	4,357	40,502
Vernon Co	2,017	32,043
Washburn Co	3,542	30,505
Washington Co	11,314	81,256
Waupaca Co	6,973	51,267
Waushara Co	1,283	32,812
Winnebago Co	11,800	155,845
Wood Co	30,591	95,610
Workforce Conn Juneau	3,920	39,477
Workforce Conn Monroe	12,756	55,625
Totals	2,000,000	10,000,000

*The JAL allocation uses the W-2 Base Allocation as part of its formula. Accordingly this allocation was updated.